Today's Presenter

Ben Dillon, MBA

Chief Strategy Officer, Geonetric

70+

Clients

Trusted by the top health systems and hospitals

500+

Digital Experiences

Delivering meaningful and compelling user-focused design and development

20+

Years

Dedication to the healthcare industry

Download the Results of the 2022 Consumer Health Survey

Craft Your Organization's Digital Front
Door Strategy

www.geonetric.com/medicom22

The Trends Driving Change

Digital Front Door

Age of Respondents

65+, 5.92%

18 to 24, 13.49%

45 to 64, 28.62%

25 to 44, 51.97%

When it comes to adopting new technologies, I consider myself to be a(n):

Early adopter, 27.48%

Late majority adopter, 31.46%

Laggard (or Late adopter), 7.62%

Early majority adopter, 33.44%
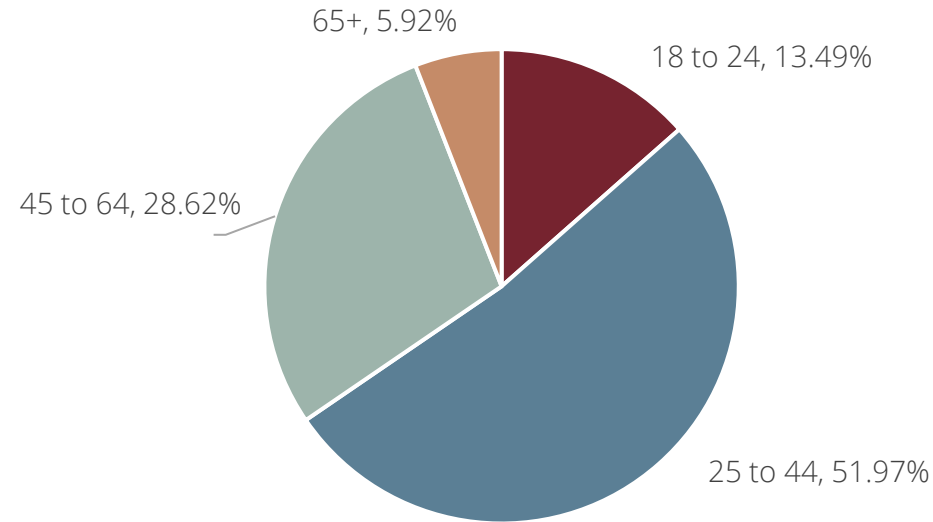
We surveyed 601 healthcare consumers.

But consumers aren't all the same.
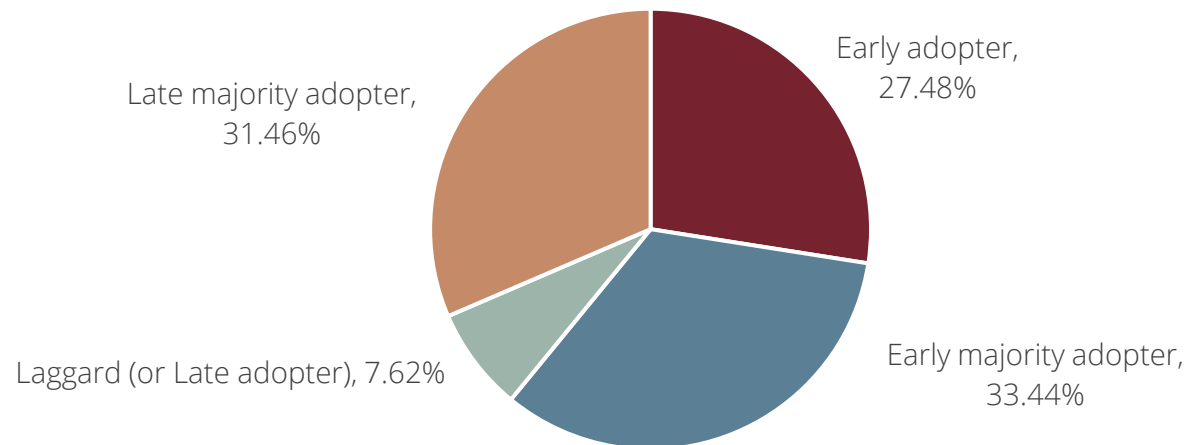
There are distinctive behavioral groups found in age and technology adoption.

Age Group Distribution for Tech Adoption
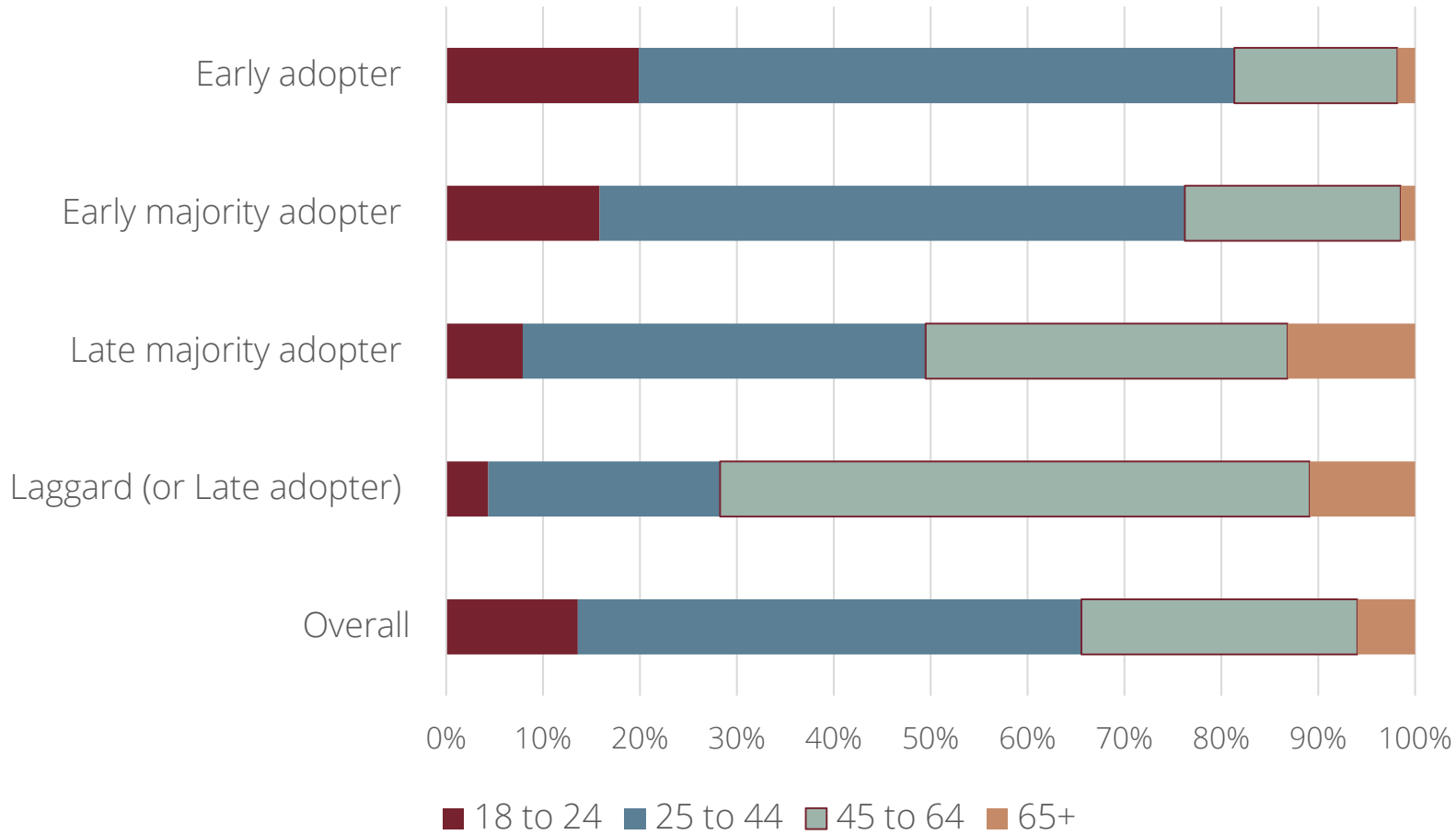
Average Age	
Early adopter	36
Early majority adopter	38
Late majority adopter	46
Laggard (or Late adopter)	50
Overall	41

Let's Begin with a Journey

A Typical Healthcare Journey...

Research Health Issues

↓

Self-diagnosis

↓

Researching care options

↓

ER wait times

↓

Select a doctor

↓

Appointment scheduling

↓

Out-of-pocket costs

↓

Pre-appt paperwork

↓

Appt reminders

↓

Hold appointment

↓

Lab results

↓

Bill pay

↓

Ask questions

Preferred Interaction Channels

Legend: Website

Category	Value
Research health issues	63%
Self-diagnosis	56%
Researching care options	59%
ER wait times	38%
Select a doctor	50%
Appointment scheduling	26%
Out-of-pocket costs	37%
Pre-appt paperwork	37%
Appt reminders	15%
Hold appointment	23%
Lab results	32%
Bill pay	39%
Ask questions	16%

Preferred Interaction Channels

Website — Phone

Preferred Interaction Channels

Legend: Website, Texting

Category	Website	Texting
Research health issues	63%	6%
Self-diagnosis	56%	4%
Researching care options	59%	6%
ER wait times	38%	8%
Select a doctor	50%	6%
Appointment scheduling	26%	7.5%
Out-of-pocket costs	36.5%	6%
Pre-appt paperwork	37%	7%
Appt reminders	15%	40.5%
Hold appointment	23%	10%
Lab results	32%	10%
Bill pay	39.5%	5%
Ask questions	16.5%	14.5%

Preferred Interaction Channels

What This Means to You…

- Use the right channel for the job!

- Support as much of the entire journey as possible through the web

- In particular, make sure you've got strong support for researching and shopping tasks through the web

- Look to other channels at points where consumers think they make the most sense – Apps for patient activities, messaging for reminders and provider office questions, etc.

Researching Health Info

When researching health conditions online, how likely are you to use each of the following?

94%

Are Somewhat or Very Likely to use
A search engine
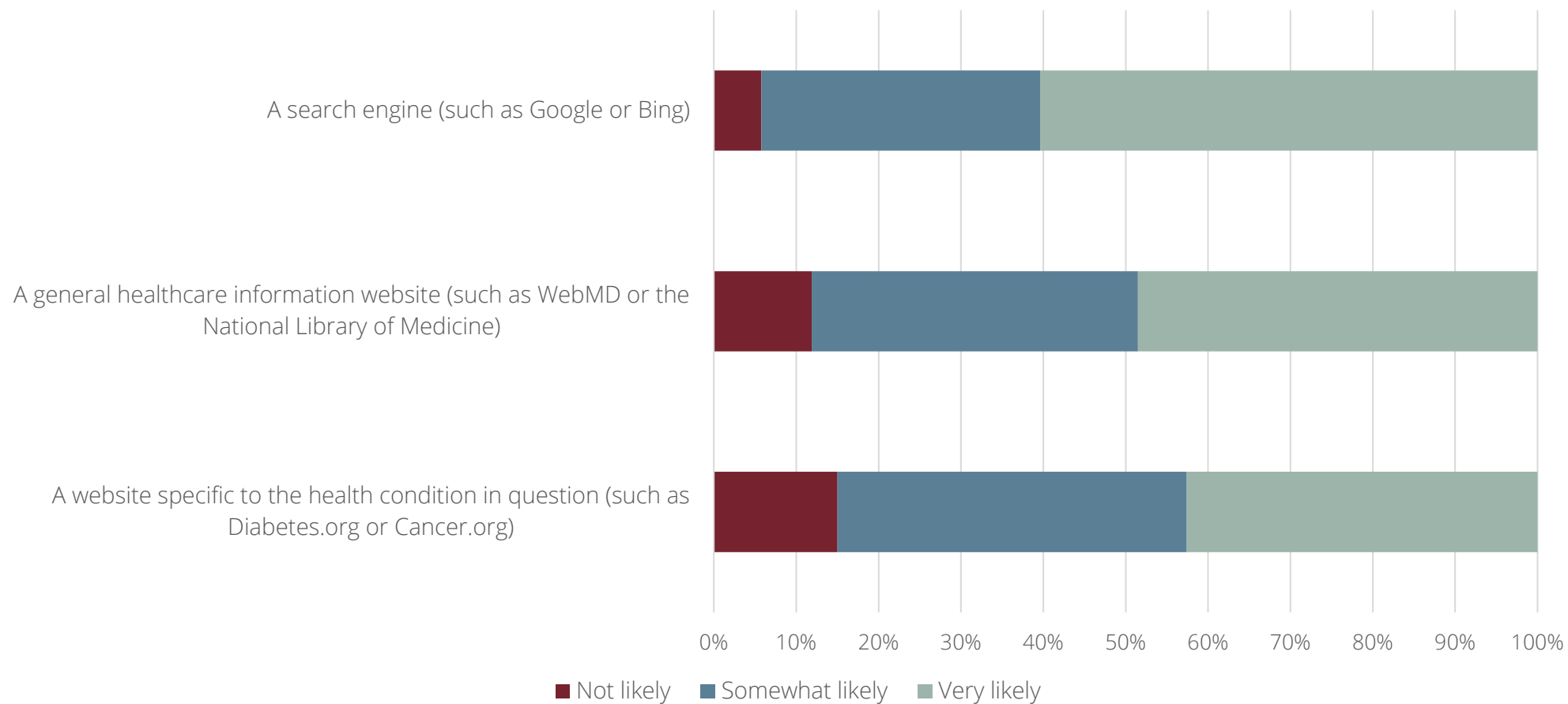
When researching health conditions online, how likely are you to use each of the following?

When researching health conditions online, how likely are you to use each of the following?

A search engine (such as Google or Bing)

A general healthcare information website (such as WebMD or the National Library of Medicine)

A website specific to the health condition in question (such as Diabetes.org or Cancer.org)

Local hospital/health system website

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

■ Not likely   ■ Somewhat likely   ■ Very likely

When researching health conditions online, how likely are you to use each of the following?

Legend: Not likely (dark red), Somewhat likely (blue), Very likely (green)

- A search engine (such as Google or Bing)
- Voice search (Siri or Alexa)

X-axis: 0% 20% 40% 60% 80% 100%

When researching health conditions online, how likely are you to use each of the following? (Scored)

Legend (right side, top to bottom):
- Early adopter
- 18 to 24
- Overall
- 65+
- Laggard (or Late adopter)

Y-axis values: 3.00, 2.50, 2.00, 1.50, 1.00, 0.50, -

X-axis categories:
- A search engine (such as Google or Bing)
- A general healthcare information website (such as WebMD or the National Library of Medicine)
- A website specific to the health condition in question (such as Diabetes.org or Cancer.org)
- National hospital/health system website (such as Mayoclinic.com)
- Local hospital/health system website
- Mobile apps
- Social media (such as Facebook or Twitter)
- Voice search (Siri or Alexa)

What This Means to You...

- Consumers start their health research at the search engine
- If not there, then national health library sites or deep content disease sites
- Most health system content strategies around disease and condition information should prioritize SEO use cases

How Do Consumers Pick?

Last time you sought care, how important were each of the following factors in making your decision?

Accepts your insurance

Availability and timeliness of appointments

Pricing / cost transparency

Doctor's experience level

0% 20% 40% 60% 80% 100%

■ Not important ■ Somewhat important ■ Very important

Last time you sought care, how important were each of the following factors in making your decision?

Legend: Not important, Somewhat important, Very important

Categories (top to bottom):
- Accepts your insurance
- Availability and timeliness of appointments
- Convenient location
- Convenient hours
- Ability to schedule appointments online
- Ease of searching for care options

Last time you sought care, how important were each of the following factors in making your decision?

Accepts your insurance

Availability and timeliness of appointments

Existing relationship with the care provider

Ratings and reviews from other health consumers

0%   20%   40%   60%   80%   100%

■ Not important   ■ Somewhat important   ■ Very important

Last time you sought care, how important were each of the following factors in making your decision?

Legend (right side of chart):
- Early adopter
- Overall
- Laggard (or late adopter)
- 65+

X-axis categories:
- Accepts your insurance
- Availability and timeliness of appointments
- Pricing / cost transparency
- Convenient hours
- Convenient location
- Doctor's experience level
- Ease of searching for care options
- Ability to schedule appointments online
- Existing relationship with the care doctor
- Ratings and reviews from other health consumers
- Availability of telehealth appointments
- Personal information about the provider ...
- Doctor videos
- Doctor's photo

Y-axis: 1.50, 2.00, 2.50, 3.00, 3.50, 4.00, 4.50, 5.00

Last time you sought care, how important were each of the following factors in making your decision?

Legend:
- Early adopter
- Overall
- Laggard (or late adopter)
- 65+

Y-axis values: 5.00, 4.50, 4.00, 3.50, 3.00, 2.50, 2.00, 1.50

X-axis categories:
- Accepts your insurance
- Availability and timeliness of appointments
- Pricing / cost transparency
- Convenient hours
- Convenient location
- Doctor's experience level
- Ease of searching for care options
- Ability to schedule appointments online
- Existing relationship with the care doctor
- Ratings and reviews from other health consumers
- Availability of telehealth appointments
- Personal information about the provider ...
- Doctor videos
- Doctor's photo

Last time you sought care, how important were each of the following factors in making your decision?

Legend:
- Early adopter
- Overall
- Laggard (or late adopter)
- 65+

X-axis categories:
- Accepts your insurance
- Availability and timeliness of appointments
- Pricing / cost transparency
- Convenient hours
- Convenient location
- Doctor's experience level
- Ease of searching for care options
- Ability to schedule appointments online
- Existing relationship with the care doctor
- Ratings and reviews from other health consumers
- Availability of telehealth appointments
- Personal information about the provider ...
- Doctor videos
- Doctor's photo

Y-axis values: 5.00, 4.50, 4.00, 3.50, 3.00, 2.50, 2.00, 1.50

What This Means to You...

- Make sure that you have the data in your provider profiles that supports consumer choices
- The things towards the bottom are still going to matter
- Work on strategies to compete for consumers and patients for every encounter

Making a Change

43%

of consumers received care
from a new provider or healthcare system
in the past 2 years

Why did they change providers?

Overall, two reasons were most prominent

- – Healthcare needs were changing

- – A general desire for something better or different

Why did they change providers?

A few other themes clearly emerged

- Lots of people moved or, in a few cases, their provider's office moved.

- Changing insurance or their provider no longer accepted their insurance

- References to price or cost

- A surprising number of consumers had a doctor move away, retire, die, or other leave medical practice

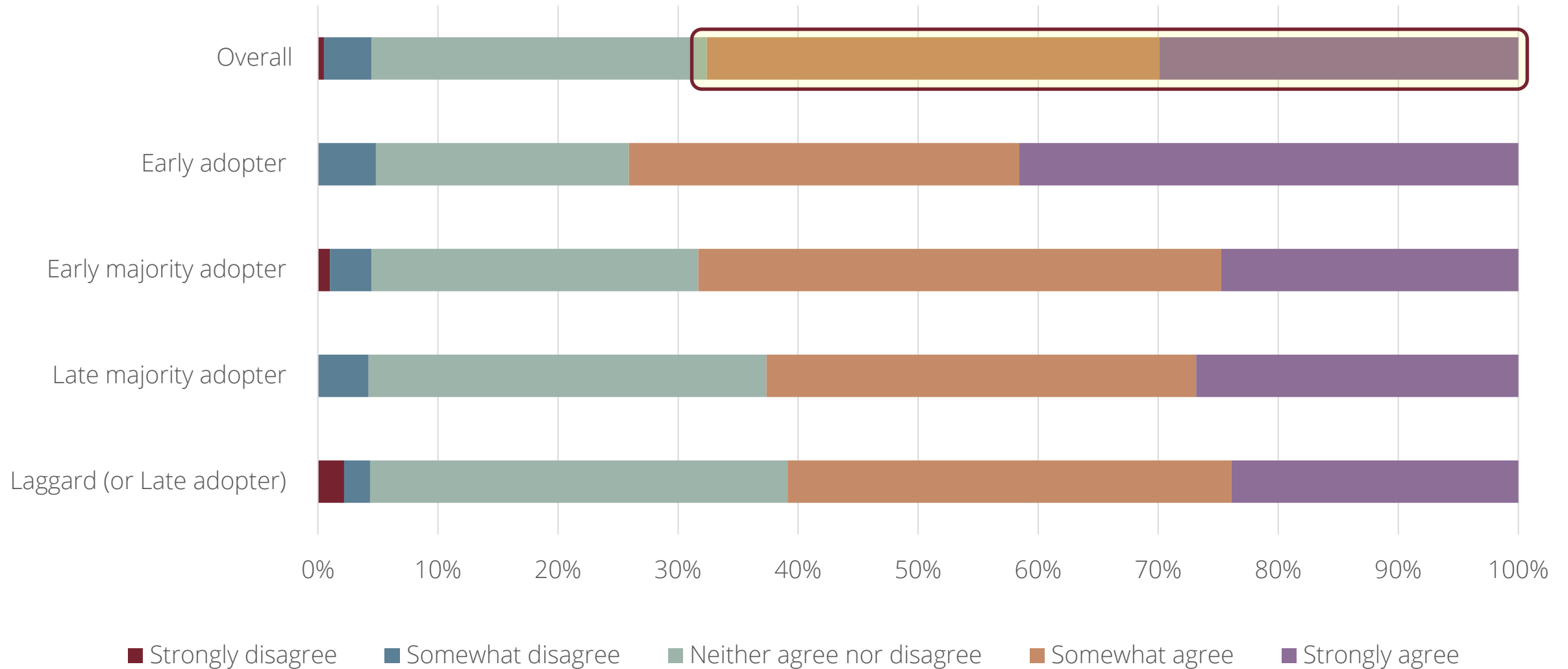- A desire for greater convenience (including seeking telehealth options)

What This Means to You...

- Patient acquisition isn't enough!

- Track and **manage** your patient satisfaction issues

- Look into connection, nurturing, and engagement with current patients throughout their journey

- While your patient relationships are at risk, there is also an unprecedented opportunity to recruit new patients
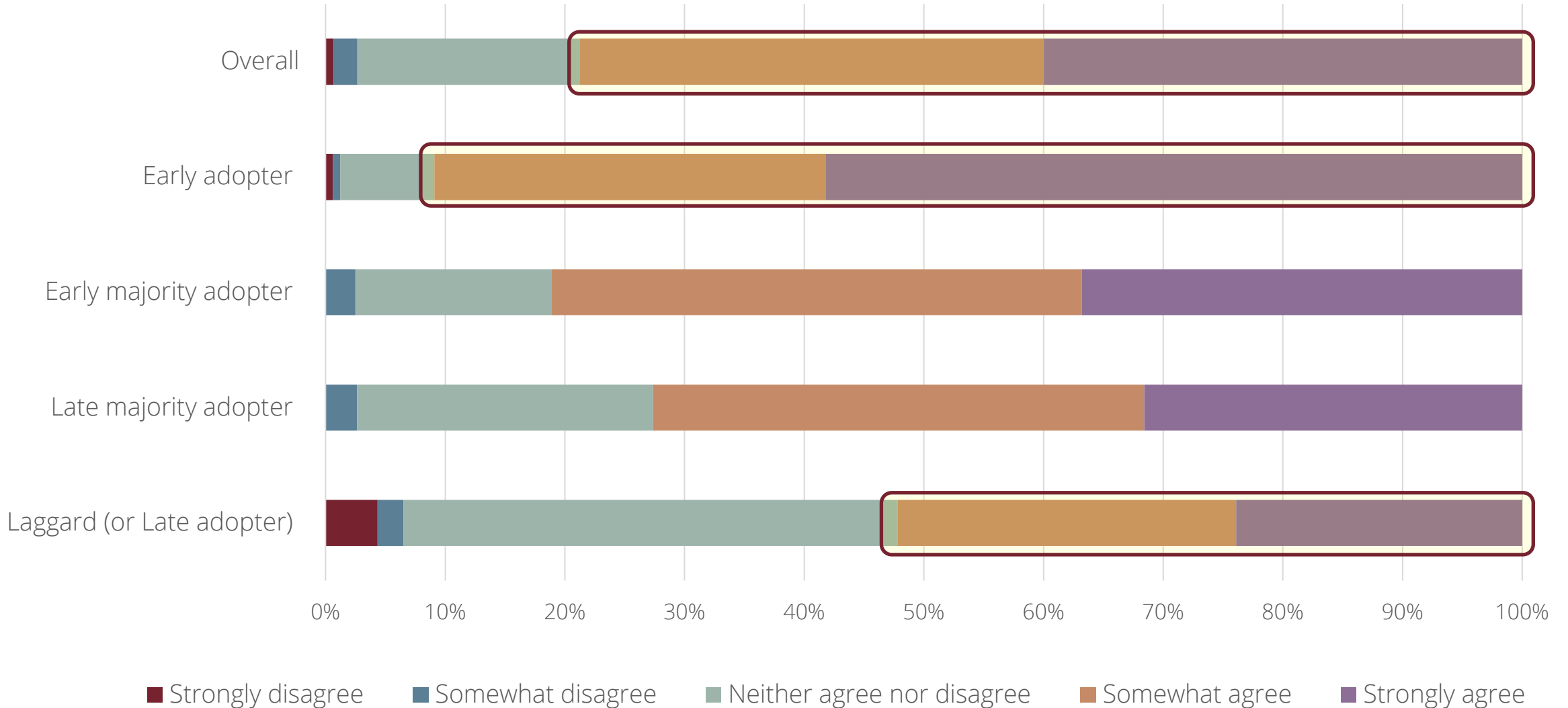
Personalization and Privacy

It is frustrating when healthcare websites show or recommend information or actions that aren't relevant to me.

■ Strongly disagree	■ Somewhat disagree
■ Neither agree nor disagree	■ Somewhat agree
■ Strongly agree	

Categories (top to bottom): Overall, Early adopter, Early majority adopter, Late majority adopter, Laggard (or Late adopter)

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%, 90%, 100%

I expect healthcare websites to personalize my experience by understanding my preferences and needs as an individual to deliver more relevant information and services.

Legend:
- ■ Strongly disagree
- ■ Somewhat disagree
- ■ Neither agree nor disagree
- ■ Somewhat agree
- ■ Strongly agree

Categories (top to bottom):
- Overall
- Early adopter
- Early majority adopter
- Late majority adopter
- Laggard (or Late adopter)

X-axis: 0% to 100%

I trust healthcare websites to protect the privacy of my information.

- Overall
- 18 to 24
- 25 to 44
- 45 to 64
- 65+
- Early adopter
- Early majority adopter
- Late majority adopter
- Laggard (or Late adopter)

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Strongly disagree   ■ Somewhat disagree   ■ Neither agree nor disagree   ■ Somewhat agree   ■ Strongly agree
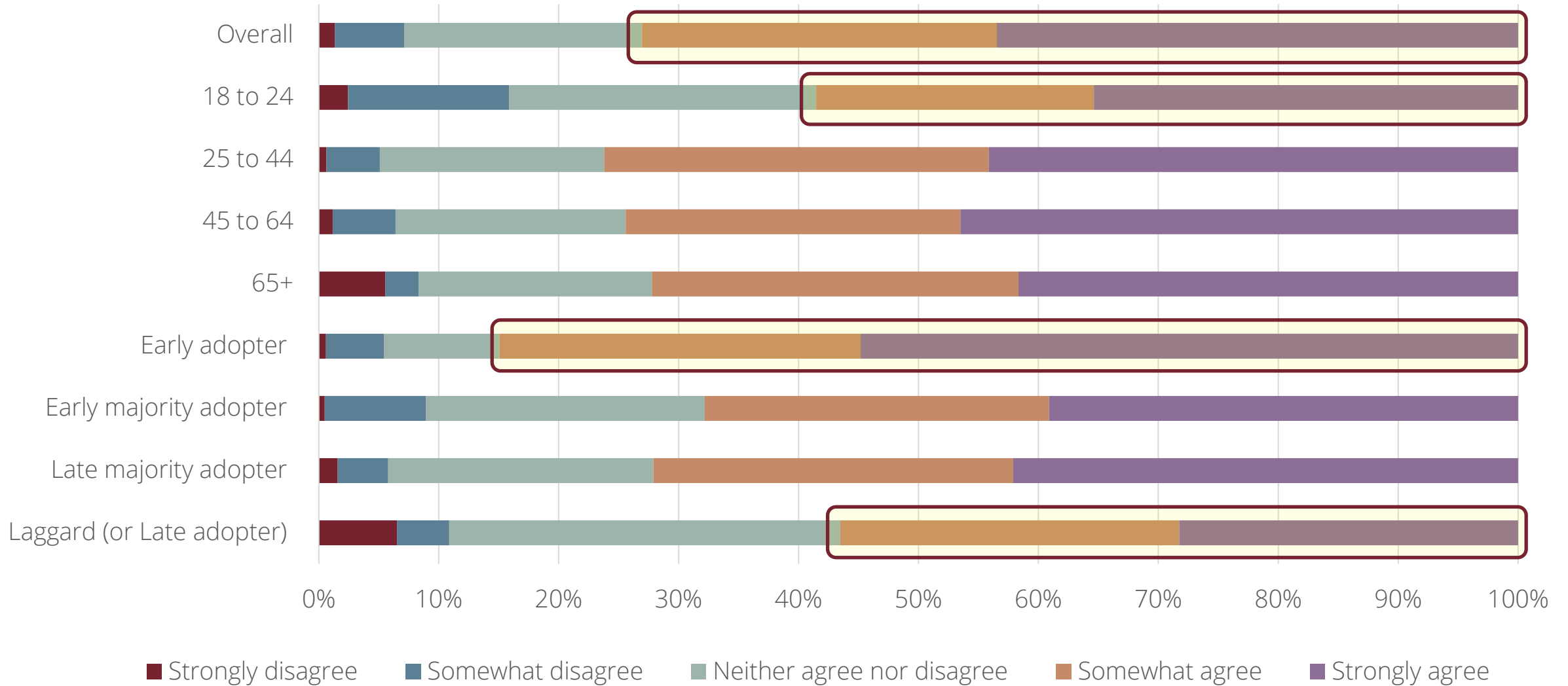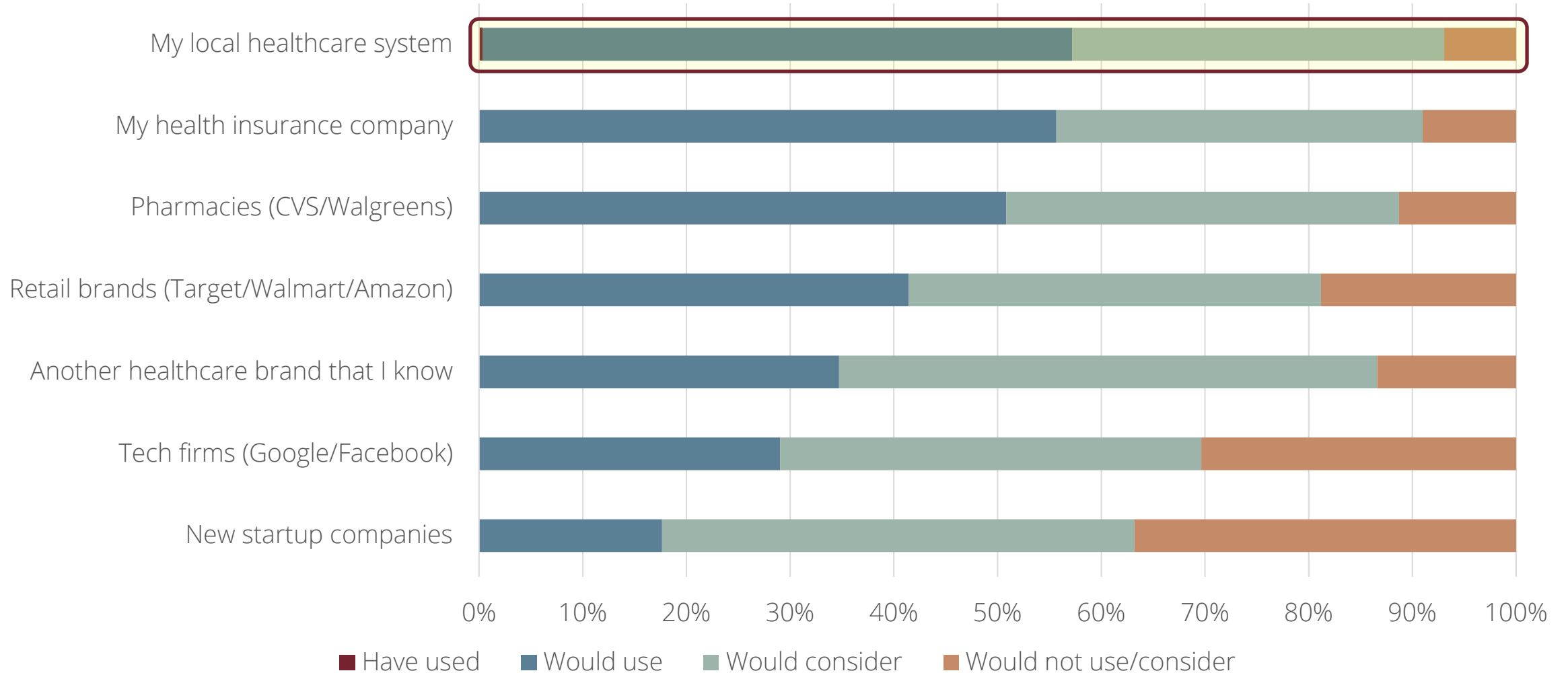
What This Means to You...

- This is a green light to create personalized experiences
  - Consumers want them
  - They're frustrated when they don't have them
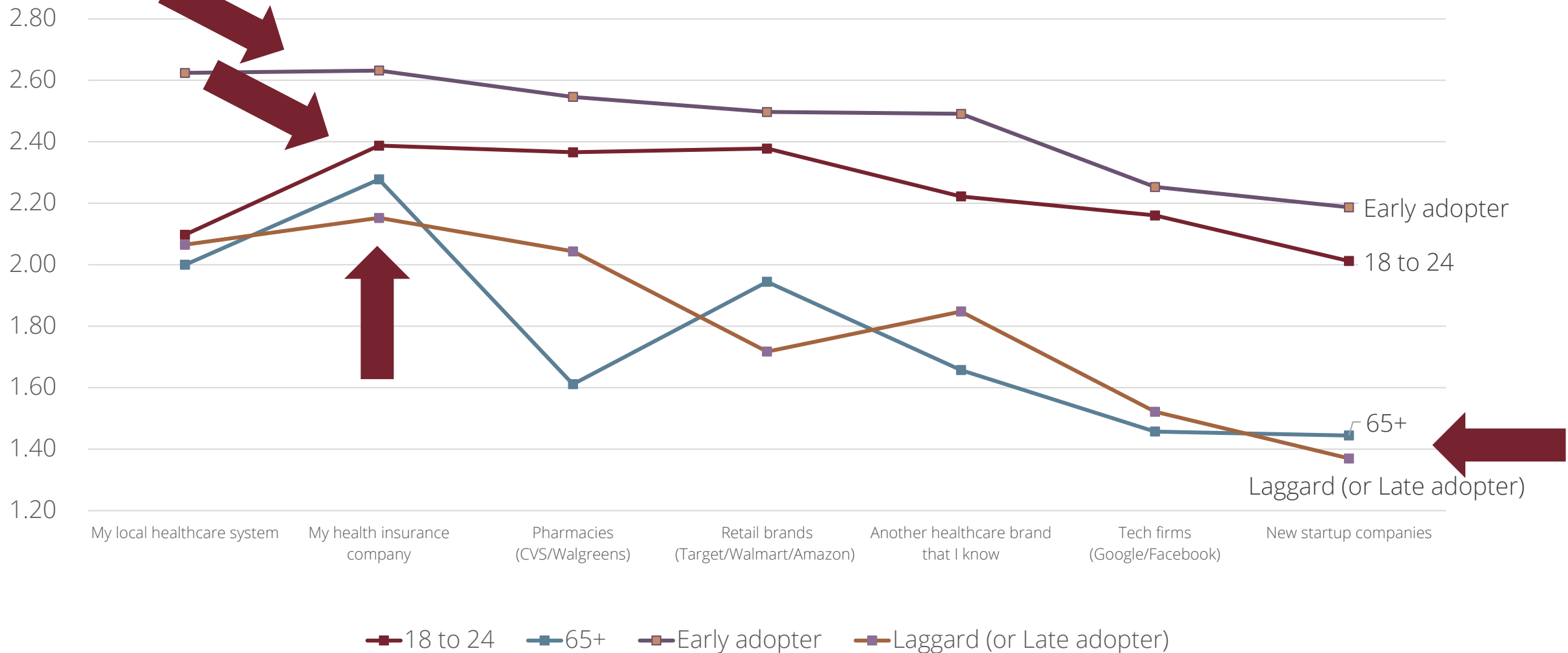 - They trust you to capture the data you need to make them happen

Trusting New Players

Please rate your level of comfort with using each of the following to deliver quality medical care through telehealth (virtual care by phone or computer):

Legend: Have used | Would use | Would consider | Would not use/consider

Categories (top to bottom):
- My local healthcare system
- My health insurance company
- Pharmacies (CVS/Walgreens)
- Retail brands (Target/Walmart/Amazon)
- Another healthcare brand that I know
- Tech firms (Google/Facebook)
- New startup companies

Please rate your level of comfort with using each of the following to deliver quality medical care through telehealth (by tech adoption)

Early adopter

18 to 24

65+

Laggard (or Late adopter)

| | My local healthcare system | My health insurance company | Pharmacies (CVS/Walgreens) | Retail brands (Target/Walmart/Amazon) | Another healthcare brand that I know | Tech firms (Google/Facebook) | New startup companies |

2.80
2.60
2.40
2.20
2.00
1.80
1.60
1.40
1.20

Legend: 18 to 24 — 65+ — Early adopter — Laggard (or Late adopter)

What This Means to You...

- You have a trust advantage over new players TODAY
- That doesn't mean that you're SAFE, only that you have TIME to improve your experience to be more competitive
- You may not feel patient departures...yet
- Make use of the window you have today to invest in digital front door initiatives

Q&A with Today's Presenter

Ben Dillon, MBA
Chief Strategy Officer, Geonetric

- Questions for Ben? Enter them in the chat!

Download the Results of the 2022 Consumer Health Survey

Craft Your Organization's Digital Front Door Strategy

www.geonetric.com/medicom22

415 12th Avenue SE
Cedar Rapids, IA 52401

855.848.7407
hello@geonetric.com
www.geonetric.com